Understanding Who is Coming to Idaho and Why

ANNA BLOUNT
OCTOBER ‘21
WHO WE ARE

Established in 1978 as a market research consultancy
Headquartered in Columbus, OH and Toronto, ON
Focused in tourism since 1985
Working with over 150 Destinations and Brands
AGENDA

- 2020 Idaho Overnight Domestic Visitation - Key Shifts from 2019
- American Traveler Sentiment – Takeaways for Fall Travel
2020 Domestic Overnight Visitation - Regions

- Midwest: -20.0% vs 2019
- Northeast: -31.4% vs 2019
- South: -8.9% vs 2019
- West: -13.6% vs 2019
2020 Idaho Travel USA® Overnight Children in Household

49% Children 17 or under in household

+ 5 pts vs 2019
### 2020 Idaho Travel USA® Overnight Main Purpose of Trip

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Percentage</th>
<th>Change vs 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting friends/ relatives</td>
<td>38%</td>
<td>-6 pts</td>
</tr>
<tr>
<td>Outdoors</td>
<td>15%</td>
<td>+4 pts</td>
</tr>
<tr>
<td>Touring</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>City trip</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Special event</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Casino</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Resort</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Conference/ Convention</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Other business trip</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Business-Leisure</td>
<td>6%</td>
<td></td>
</tr>
</tbody>
</table>
# Idaho Travel USA® Overnight Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>20%</td>
</tr>
<tr>
<td>Attending celebration</td>
<td>20%</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>19%</td>
</tr>
<tr>
<td>Landmark/historic site</td>
<td>17%</td>
</tr>
<tr>
<td>Hiking/backpacking</td>
<td>16%</td>
</tr>
<tr>
<td>Business meeting</td>
<td>14%</td>
</tr>
<tr>
<td>National/state park</td>
<td>14%</td>
</tr>
<tr>
<td>Attended/participated in an amateur sports event</td>
<td>13%</td>
</tr>
<tr>
<td>Business convention/conference</td>
<td>13%</td>
</tr>
<tr>
<td>Camping</td>
<td>12%</td>
</tr>
</tbody>
</table>
# 2020 Idaho Travel USA® Overnight Activities

## Shopping Types on Trip

<table>
<thead>
<tr>
<th>Shopping Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience/grocery shopping</td>
<td>58%</td>
</tr>
<tr>
<td>Big box stores (Walmart, Costco)</td>
<td>52%</td>
</tr>
<tr>
<td>Outlet/mall shopping</td>
<td>45%</td>
</tr>
<tr>
<td>Souvenir shopping</td>
<td>41%</td>
</tr>
<tr>
<td>Boutique shopping</td>
<td>27%</td>
</tr>
</tbody>
</table>

Base: 2020 Overnight Person-Trips that included Shopping

## Dining Types on Trip

<table>
<thead>
<tr>
<th>Dining Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique/local food</td>
<td>36%</td>
</tr>
<tr>
<td>Picnicking</td>
<td>24%</td>
</tr>
<tr>
<td>Food delivery service (UberEATS, DoorDash, etc.)</td>
<td>23%</td>
</tr>
<tr>
<td>Street food/food trucks</td>
<td>22%</td>
</tr>
<tr>
<td>Fine/upscale dining</td>
<td>19%</td>
</tr>
<tr>
<td>Gastropubs</td>
<td>15%</td>
</tr>
</tbody>
</table>

Base: 2020 Overnight Person-Trips that included Shopping
2020 Idaho Travel USA® Overnight Origin Markets

DMA Origin Of Trip

- Boise, ID: 11%
- Spokane, ID/WA: 8%
- Salt Lake City, ID/UT: 7%
- Los Angeles, CA: 5%
- New York, NY: 5%
- Idaho Falls-Pocatello, ID: 4%
- Seattle-Tacoma, WA: 4%

-3 pts vs 2019
2020 Idaho Travel USA® Overnight Origin Markets

State Origin Of Trip

- Idaho: 20% - 4 pts vs 2019
- Washington: 10%
- California: 9%
- Utah: 7%
- Florida: 5%
73% of Idaho overnight trips in 2020 involved travelers driving their own cars/trucks to the destination.

64% used their car/truck as primary transportation in 2019.
Average Length of Trip: 5.3 Nights

1.9 nights outside of Idaho
3.4 nights in Idaho

On average, 65% of each trip including at least one night in Idaho was spent in the state.
2020 Idaho Travel USA® Overnight Travel Party

Size of Travel Party

- **Idaho**
  - Adults
  - Children
  - Average number of people: **3.5**

- **U.S. Norm**
  - Adults
  - Children
  - Average number of people: **3.0**

Percent Who Traveled Alone

- Just myself / traveled alone: 21% (Idaho) vs. 25% (U.S. Norm)

Composition of Immediate Travel Party

- **Spouse/partner**: 60% (Idaho) vs. 60% (U.S. Norm)
- **Child(ren)**: 42% (Idaho) vs. 37% (U.S. Norm)
- **Friend(s)**: 19% (Idaho) vs. 18% (U.S. Norm)
- **Parent(s)**: 16% (Idaho) vs. 12% (U.S. Norm)
- **Other relative(s)**: 15% (Idaho) vs. 13% (U.S. Norm)
- **Business associate(s)**: 5% (Idaho) vs. 4% (U.S. Norm)
booked accommodations through a short-term rental website

16% + 3 pts vs 2019

- 7 pts vs 2019

2020 Idaho Travel USA® Overnight

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Idaho</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>34%</td>
</tr>
<tr>
<td>Home of friends / relatives</td>
<td>22%</td>
</tr>
<tr>
<td>Motel</td>
<td>19%</td>
</tr>
<tr>
<td>Campground / RV park</td>
<td>16%</td>
</tr>
<tr>
<td>Bed &amp; breakfast</td>
<td>14%</td>
</tr>
<tr>
<td>Rented cottage / cabin</td>
<td>11%</td>
</tr>
<tr>
<td>Rented home / condo / apartment</td>
<td>10%</td>
</tr>
</tbody>
</table>
of overnight visitors to Idaho have visited before in the past 12 months

- 18 - 24: 52%
- 25 - 34: 60%
- 35 - 44: 70%
- 45 - 54: 65%
- 55 - 64: 66%
- 65+: 63%
69% of overnight visitors were highly satisfied with their trip to Idaho.

- 7 pts vs 2019
<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friendliness of people</td>
<td>61%</td>
</tr>
<tr>
<td>Quality of accommodations</td>
<td>59%</td>
</tr>
<tr>
<td>Safety/security</td>
<td>59%</td>
</tr>
<tr>
<td>Sightseeing/attractions</td>
<td>59%</td>
</tr>
<tr>
<td>Cleanliness</td>
<td>57%</td>
</tr>
<tr>
<td>Quality of food</td>
<td>54%</td>
</tr>
<tr>
<td>Value for money</td>
<td>49%</td>
</tr>
<tr>
<td>Music/nightlife/entertainment</td>
<td>47%</td>
</tr>
<tr>
<td>Public transportation</td>
<td>43%</td>
</tr>
</tbody>
</table>
Key Takeaways

Younger & Older
Keep first-time younger travelers while welcoming back older travelers now willing to travel.

Out-of-State Visitation
2020 saw a rise in out-of-state visitor share – who traditionally spend more. Further expanding this has positive implications of per person spending.

Satisfaction
High satisfaction is key to converting first-timers into repeat visitors. Look to delivering across age demographics.

Bleisure Expansion?
For many travelers, implications of work life infiltrating leisure travel, will monitor through 2021 & 2022 to see how long-term.
1. Understand the resident as the traveler for the first time

2. Provide valuable insights to this industry to navigate the pandemic and power the recovery
Methodology:

1,000 US Adult Travelers

Fielded every other week
TRAVEL INTENT

Do Americans intend to travel in the next 6 months?
Do Americans intend to travel?

9 in 10 American travelers have had plans to travel in the next six months.

Wave 47 Fielded 9/27/21
However, COVID-19 is still influencing travel decisions”

- 34% are reducing the numbers of trips they’ll take
- 32% are choosing drive rather than fly destinations
- 19% are choosing rural over city destinations
- Only 9% are canceling trips

Wave 47 Fielded 9/27/21
02

How & Where

What do they plan to do this fall?
Fall 21 travel

Nearly 2/3 to see friends and relatives

Half plan to hit the road

Wave 45 Fielded 9/1/21
Are clear health and safety protocols important to American travelers?
Americans are split on the importance of clear health & safety protocols.

51% Clear health and safety protocols at a destination are important.
44% NO restrictions are important.
43% Mask wearing requirements are important.

Wave 45 Fielded 9/1/21
Compared to earlier this year, the availability of attractions and dining are important.

![Bar chart comparison between March and September for Dining and Attractions Open.]

- **Dining Open**
  - March: 35
  - September: 42

- **Attractions Open**
  - March: 35
  - September: 42

Wave 45 Fielded 9/1/21
What type of service do travelers expect?
Expectations and services received have remained stable

Wave 46 Fielded 9/15/21
COMMUNITIES

How important is it for our communities to be open?
Support for opening communities to visitors is key

36% March
40% Sept

Feeling welcome in the destination

Wave 45 Fielded 9/1/21
Welcoming visitors into our communities has been wavering and sits near early Q1 levels.
Thank You!

Anna Blount
Senior Director
ablount@longwoods-intl.com